

Contents (Click on the highlighted words for quick access!)

| | | |
|-----------------------------|--|------|
| Module 1: | 1. Welcome and Introductions..... | 1-2 |
| Overview | 2. The Need for a Corporate HR Information System..... | 1-5 |
| | 3. The End User's Role in Implementation..... | 1-9 |
| | 4. Quick Quiz | 1-10 |
| <hr/> | | |
| Module 2: | 1. Key Concepts..... | 2-2 |
| PeopleSoft Basics | 2. Key Features..... | 2-8 |
| | 3. Navigational Techniques and Tips | 2-11 |
| | 4. Exploring The New World of CHRIS | 2-14 |
| | 5. Quick Quiz | 2-15 |
| <hr/> | | |
| Module 3: | | |
| Processing Personnel | 1. The CHRIS Processing Procedures | 3-2 |
| Actions | 2. Trial Run Exercise | 3-4 |
| | 3. In-Basket Exercise | 3-5 |
| <hr/> | | |
| Module 4: | 1. Testing 1,2,3..... | 4-2 |
| Going Live! | 2. Showtime..... | 4-3 |
| <hr/> | | |
| Module 5: | 1. Back to the Future..... | 5-2 |
| Next Steps | 2. Final Check | 5-3 |
| | 3. Evaluation | 5-6 |
| | 4. Follow Up..... | 5-8 |
| <hr/> | | |

Module 1: Overview

Contents

1. Welcome and Introductions
 2. The Need for a Corporate Human Resource Information System
 3. The CHRIS End Users Role in Implementation
 4. Quick Quiz
-

Objectives

- By the end of this module, participants will be able to:
- ♦ Identify the drivers behind the implementation of CHRIS;
 - ♦ Identify the benefits of CHRIS over PAY/PERS; and
 - ♦ Describe their role in the implementation process.
-

1. Welcome and Introductions

Welcome

Welcome to the world of CHRIS! For the next two days, we'll be working together to help your site come on-line and ensure that you are able to help your site take advantage of the many benefits of DOE's new **Corporate Human Resource Information System (CHRIS)**.

Course Objectives

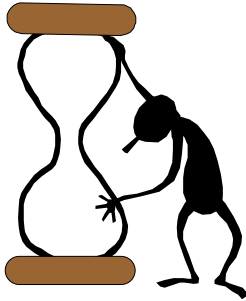
In general, this course will:

- ♦ Introduce you to the benefits of CHRIS;
- ♦ Help you become confident in your ability to navigate the CHRIS database;
- ♦ Provide an opportunity for you to practice entering personnel action requests;
- ♦ Provide an opportunity for you to enter live data into CHRIS; and
- ♦ Challenge you to become a part of the network of expert end users.

Specifically, by the end of this course we want you to have experience entering at least the following personnel actions:

- ♦ Award
 - ♦ Change in Hours
 - ♦ Hire
 - ♦ Promotion
 - ♦ Reassignment
 - ♦ Resignation
 - ♦ Separation—RIF
 - ♦ Within Grade Increase
-

Course Agenda



Day One

8:30 - 9:20 **Module 1: Overview**
The Need for a New HR System
CHRIS's Capabilities
The End User's Role in Implementation

9:20 - 9:30 **Break**

9:30 - 11:00 **Module 2: PeopleSoft Basics**
Key Concepts
Key Features
Navigational Techniques and Tips
Explore the New World of CHRIS

11:00 - 12:00 **Module 3: Processing Personnel Actions**
CHRIS Processing Procedures
Trial Run Exercise

12:00 - 1:00 **Lunch**

1:00 - 4:30 **Module 3: Processing Personnel Actions**
In-Basket Exercise

Day Two

8:30 - 12:00 **Module 4: Going Live!**
Testing 1,2,3
Showtime—Act I

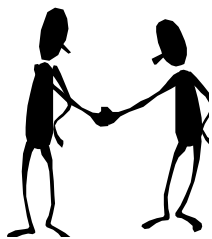
12:00 - 1:00 **Lunch**

1:00 - 4:00 **Going Live!**
Showtime—Act II

4:00 - 4:30 **Module 5: Next Steps**
Back to the Future
Final Check
Evaluation
Follow Up

Course Facilitators

Use the space below to write in the names/numbers of the facilitators of this course for future reference.



Name
Phone
E-mail
Fax

Name
Phone
E-mail
Fax

2. The Need for a Corporate Human Resource Information System

Drivers of the New System The following are some of the key factors that drove DOE to invest in a new human resource information system.

Becoming 2000 Compliant

The current PAY/PERS system is not year 2000 compliant and alternatives needed to be identified. In considering options, the DOE HR community expressed the need for a system that does more than personnel action processing—we need a system to support the information needs of all HR functional areas—and a system that addresses these needs from a corporate perspective.

Streamlining Systems and Processes

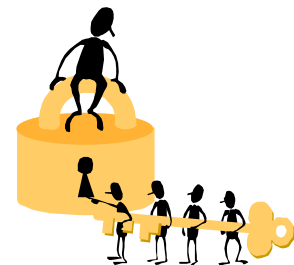
More than 80 independent information systems are used to support the human resources function across the DOE complex. Many of these systems are redundant, and the time and resources spent on maintaining and using them are enormous. Making matters worse, many of these systems cannot talk to each other—which makes sharing data across organizations or trying to “roll up” data cumbersome and labor intensive. Again, many of these systems are not year 2000 compliant and, if not replaced, soon will require major revamping.



Relatedly, many HR business process issues are ripe for streamlining. Some of these issues are being worked from a corporate perspective by the CHRIS Business Improvement Team. Others are simply being addressed by each site as they come on line. For instance, you may want to revisit some of your existing processes once you have access to CHRIS.

Increasing access to information

In our ever-changing environment, we are constantly being called on to provide better and more timely personnel-related information to support managers and employees. An integrated corporate system, with expanded access, better information



and improved reporting capabilities is integral to assisting HR employees in these advisory roles.

The Internet and other web-enabled technologies have greatly changed our access and reliance on information in many aspects of our personal lives. We need a personnel system that will allow us to bring the benefits of these latest technologies to the workplace.

Reducing Costs

Without the purchase of the corporate system, we would have likely ended up with even more independent systems across the complex. The corporate purchase of PeopleSoft to serve as the foundation of CHRIS saved DOE approximately \$2.7 million over what it would have cost to purchase a PeopleSoft license for each site. The PeopleSoft program was a cost-effective option for developing a corporate human resources information system because it required very little customization. Using a commercial off-the-shelf (COTS) product like PeopleSoft enables DOE to take advantage of best commercial HR practices and drastically reduces the expense of developing and maintaining a tailored system.



How CHRIS Was Developed *Use the space below to take notes from the multimedia presentation regarding the development of CHRIS.*

What CHRIS Can Do Today Currently, DOE is using—and you are being trained on—Version 5.2 of the PeopleSoft software. On a corporate level, DOE is using the system to:

- ♦ Process Personnel Action Requests (SF52's) including:
- ♦ Provide Notification of Personnel Action Requests (SF50's); and
- ♦ Provide Position Description Cover Sheets (OF-8's)

Initially, CHRIS will be used to process SF-52's and 50's. It will not become the system of record until the payroll portion of PAY/PERS is outsourced. Until this time, you will need to process personnel actions in both PAY/PERS (to serve as the official source of personnel information and to process paperwork) and CHRIS (to begin building and maintaining a historical record of an individual's files). This is an important time period for you to learn the system and for the CHRIS team to test and resolve any discrepancies between the systems.

**CHRIS:
A Work in Progress**

In general, DOE will eventually use CHRIS to:

- ♦ Align core HR needs and practices across the DOE community;
- ♦ Consolidate personnel data into a single integrated system; and
- ♦ Provide better information for improved decision making.

Specifically, CHRIS will:

- ♦ Enable managers and supervisors to access real-time personnel data from their desktops or—for unclassified data—from anywhere in the world;
 - ♦ Enable managers and supervisors to initiate personnel requests and receive notification of their processing electronically (i.e., SF 52's and 50's will be done on-line);
 - ♦ Enable employees to enter their own personal data and make changes to their insurance/benefits information;
 - ♦ Enable HR personnel to spend more time providing personal consultation or management advice rather than administrative processing; and
 - ♦ Provide personnel forms on-line and automate certain notification processes.
-

Future PeopleSoft Features

We anticipate that PeopleSoft 7.0 will be available to all DOE sites in early 1998. The main features and benefits of the upgrade include the following:

Increased Federal Functionality

- ♦ A navigation tool combined with a redesigned personnel action request process that will make it easier for you to process an action.
- ♦ Enhanced workflow design will eventually allow all requests to be generated, authorized, approved, and processed in a paperless environment.
- ♦ The security, reporting, and leave processing features will be improved based on recommendations by the Federal Users Group (FUG).
- ♦ Modules for salary administration, training administration and benefits will be added later.
- ♦ Processing of mass change actions will be available.

Technology Advancements

- ♦ Transactions will be able to be conducted on the web.
 - ♦ More users will be able to access records simultaneously and at greater speeds.
-

Benefits Over PAY/PERS

Use the space below to brainstorm some of the advantages of CHRIS over PAY/PERS.

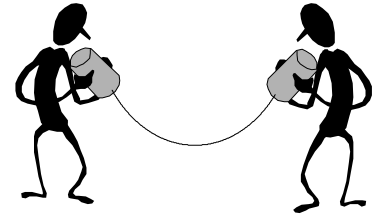


3. The CHRIS End User's Role in Implementation

What You Can Do

You have been selected as a user who can help DOE ensure rapid and effective implementation of CHRIS.

- ♦ **Learn it: Be a subject matter expert.** Learn all you can about the system and its future capabilities. Become the person other people seek out when they need help or information.
- ♦ **Use it: Be a change agent** by using the system and encouraging others to do so.
- ♦ **Fix it: Be a trouble shooter.** As you use the system, identify and report problem areas. Use the Keystroke Log Sheet to record actions (see “Additional Resources” tab).
- ♦ **Share it: Be a network liaison.** Maintain a relationship with other end users as a resource for solving problems and identifying better ways of doing business.



4. Quick Quiz (Click on questions for answers!)

Instructions

Answer the questions below to help evaluate your understanding of the material covered in this section. We will review the answers together. No one else will see your answers.

Questions

1. What does CHRIS stand for? _____

2. List three reasons why DOE chose to develop CHRIS.
 1. _____
 2. _____
 3. _____
3. List three ways CHRIS is an improvement over PAY/PERS.
 1. _____
 2. _____
 3. _____
4. List four things you can do to help implement CHRIS.
 1. _____
 2. _____
 3. _____
 4. _____
4. How will CHRIS improve HR function/processing in the future?
5. What is PeopleSoft's relationship to CHRIS?

4. Quick Quiz

Instructions

Answer the questions below to help evaluate your understanding of the material covered in this section. We will review the answers together. No one else will see your answers.

Questions

1. What does CHRIS stand for? _____
Corporate Human Resource Information System _____
2. List three reasons why DOE chose to develop CHRIS.
 1. *Cost efficiency, PAY/PERS not yr 2000 compliant*
 2. *Streamline business processes* _____
 3. *Improve access to corporate data* _____
3. List three ways CHRIS is an improvement over PAY/PERS.
 1. *See page 1-8* _____
 2. _____
 3. _____
4. List four things you can do to help implement CHRIS.
 1. *Be a change agent* _____
 2. *Be a subject matter expert* _____
 3. *Be a trouble shooter* _____
 4. *Be a network liaison* _____
4. How will CHRIS improve HR function/processing in the future?
See page 1-8

TAKE A BREAK

5. What is PeopleSoft's relationship to CHRIS?
It is the program on which the CHRIS database is built. DOE purchased the federal version of the software and anticipates performing very little customization. This "off-the-shelf" purchase takes advantage of best commercial HR practices and drastically reduces the expense of developing a tailored system.

Module 2: PeopleSoft Basics

Contents

1. Key Concepts
 2. Key Features
 3. Navigational Techniques and Tips
 4. Exploring the New World of CHRIS
 5. Quick Quiz
-

Objectives

By the end of this module, participants will be able to:

- ◆ Distinguish between a relational database, window, panel, menu, table, field, and row;
 - ◆ Describe the relevance of the effective date;
 - ◆ Identify the functions on the tool bar;
 - ◆ List the windows available to end users; and
 - ◆ List two of their favorite navigational tips.
-

1. Key Concepts

Introduction

Before we go on line, we will explain the concepts that form the basis for how PeopleSoft/CHRIS works.

Client/Server Architecture

The CHRIS database is physically located at the Federal Energy Technology Center in Morgantown, West Virginia. It is accessible to DOE sites across the country through client/server technology. This technology involves storing the database on a large computer (referred to as the “server”). Each site has access to the database through personal computers/workstations (referred to as the “client”) and phone lines.

This technology combines the power of main frame computing with the ease and speed of personal computing. Because PeopleSoft uses Structured Query Language (SQL), when you access the database, you are requesting and receiving only the specific data you need at that time in a file that uses a .SWP extension (pronounced “swap”)—not the entire database. The first time you access a file, you will notice a slight delay while the server accesses and sends the file to your personal computer. Thereafter, there should be no delay. The speed of this exchange is one of the significant advantages of this technology.

Additional advantages of the client/server architecture are that:

- ◆ All sites have access to all the information (as limited by appropriate security) without having to have a server to hold all the data;
 - ◆ The end users’ computers and the whole network operate at optimal speed; and
 - ◆ Multiple users can access the same records simultaneously (although only one can be making changes at any given time to a particular record).
-

Relational Database

CHRIS is a relational database built using the commercial software PeopleSoft Version 5.2. In its simplest sense, a relational database is **a series of tables linked by key fields**. The advantage of a relational database is that you only have to enter data into a table once and it will automatically populate related fields. This saves time and decreases potential data entry errors.

Table

Tables are the foundation of the database. Each table is **comprised of columns and rows like a spreadsheet**. The columns in each table are the fields you see in panels as you enter data in the program. The rows of the table are the records, and contain the entries that you make in each field.

| Row (Record) | Column (Field) | | | | |
|-----------------|-------------------|-----------------|---------------|-------------|--------------|
| | Emplid | Name | Street | City | State |
| | 100 | Rodriquez, Anna | 897 Cavalry | Arlington | VT |
| | 101 | Stream, Daniel | 325 Lennon | Rockville | MC |
| | 102 | Eggert, John | 305 Maple | Alexandria | VA |

Each table has a unique name and is linked by key fields to create the relational database.

The tables for CHRIS have all been created as part of the conversion from PAY/PERS. Foundation tables are updated by the system administrator only. Whenever you process actions, ***you*** are actually changing/creating records in the database.

The key tables currently used by CHRIS include:

| Table Title | Types of Information Found in Table |
|--------------------|--|
| Job Data | Department, Grade, Salary, Benefits |
| Job | Requirements of Position |
| Position Data | Title, Work Schedule, Bargaining Unit |
| Employment | Education Level, SCD, |
| Personal | Address, Birthday, Handicap Code |

Effective Dates

Rows of data (or records) in a table are effective dated. This means a date is attached to the record that tells the computer and the user **the date the record goes into effect**.

CHRIS uses three types of dates to manage DOE records:

Future: data rows that have effective dates greater than the system date (defaults to today's date);

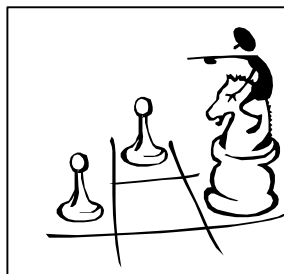
Current: the data row with the most recent effective date closest to today's system date—but not a future date. Only one row is the current row; and

History: Data rows that have effective dates less than the current data row.

This effective date arrangement provides three benefits to DOE.

First, it enables the Department to maintain a complete chronological history of all personnel and position data. With this information at our fingertips, we can roll back the system to a particular time to **perform analyses**. Or we can roll it forward to project the impact of future actions on the organization.

Second, the system uses the effective date to determine which records are operational. This means ***you can actually enter***



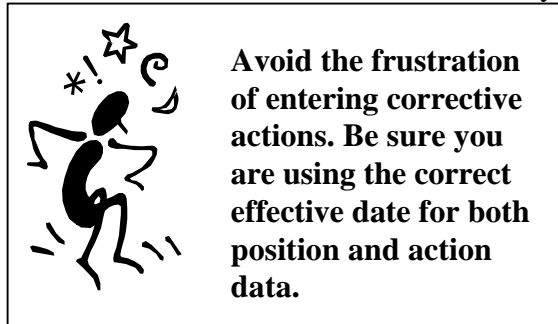
Use effective dates to keep an accurate historical record to conduct analyses and to anticipate the effect of future actions.

actions before they become effective. You just have to be sure to enter the date on which the system should recognize the effective date of the action. For example, In July, you enter information for a promotion that is not

effective until September 1 (a future action). On September 1, the system will recognize the action as the current/operational data and the previous record concerning that person becomes the historical record.

Third, you can process ***more than one action effective the same day.*** You just have to attach sequence numbers to the actions so the system knows which one to implement first. For example, you could enter a promotion and a change in work schedule to be effective the same day and give the promotion a sequence number of 1 and the change in work schedule a sequence number of 2.

Warning: The system defaults to the current day's date as the effective date for any new action you enter. Therefore, if you



are entering an action that does not go into effect the day you are entering it, you must enter the appropriate date.

For example, when processing an action that places an employee into a new Department Code, you must remember three important dates:

1. When does the Department Code go into effect?
2. What date must I use to create the position?
3. What date does the action go into effect?

Remember: The Department Code must be in effect before the action can be entered.



Managing by Position

One fundamental assumption of CHRIS is that it is more appropriate to manage DOE's personnel data by position rather than by employee. In driving the system by position, we attach data to the positions and move employees in and out of those positions. We can use the data specific to each position as the basis for organizational planning, recruitment, and career planning. This is appropriate for federal positions as the duties, responsibilities, pay and other factors are determined by the position, not the incumbent.

Note that in CHRIS positions are not abolished as they were in PAY/PERS. They simply become inactive when replaced by a new position with a more recent effective date. Therefore, when establishing a new position, the end user must ask "Do I need to inactivate the old position number assigned to this position?" (For specific instructions on how to inactivate a position number see *CHRIS Processing Procedures*, page 8.)

**Position Number vs.
PD Number**

There is an important difference between PAY/PERS and CHRIS regarding position numbers and position description numbers. Basically, what PAY/PERS called “PD number” CHRIS calls a “Position Number.” Specifically:

|  In PAY/PERS |  In CHRIS |
|---|--|
| <p>Position Description Number is a number assigned by the site.</p> | <p>Position Number is the number assigned by the requesting organization (known as PD number in PAY/PERS).</p> |
| <p>Position Number does not exist.</p> | <p>Position Description Number is a number the end users selects from a library of PD numbers that were generated by the system to describe positions based on 15 key variables. In short, it is a number generated by the system and selected by the end user. The end-user will never create this number.</p> |

The 15 variables used to identify the position number in CHRIS are listed below with their counterparts in PAY/PERS.

| PAY/PERS | CHRIS |
|--------------------------|---------------------------------|
| Submitting Office Number | Personnel Office Identifier |
| First tier | Subagency |
| Pay plan | Pay plan |
| Occupational series | Series |
| Grade | Grade |
| PATCO | PATCOB |
| FLSA | FLSA |
| Labor relations code | Manager level |
| Functional class | Functional class |
| Pay table | Salary admin plan |
| Financial interest | Financial interest |
| N/A | Executive disclosure (SES only) |
| Position sensitivity | Position sensitivity |
| Pay basis | Pay basis |
| Title | Title |

When working in CHRIS, if the system **does not** contain a match for the 15 variables you identify for a position, contact FETC to have them add it to the PD number library.

“Pushing”

CHRIS is designed to track the progress of an action from its initial request until it is completely processed and made a part of the employee’s permanent job history record. The system distinguishes where the action is in the process by using a Process Action Request (PAR) status code. The code is:

- ◆ 1 for requested;
- ◆ 4 for approved; and
- ◆ 5 for processed.


Once an action is no longer a work in progress, the end user changes the PAR status code from 4 to 5. The system then runs a scheduled program on a bi-weekly basis (on pay calc. Thursdays) to collect all actions coded with a 5 and make them a part of the permanent job history (similar to a release in PAY/PERS). This enables the system to then recognize the action as an actual event and to take the appropriate action (e.g., change the employee’s work schedule or SCD, etc.).

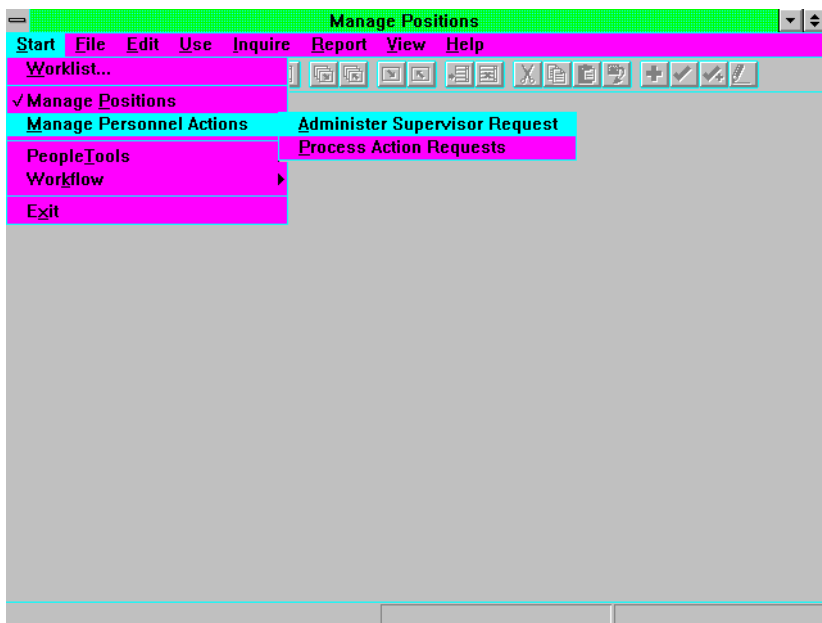
2. Key Features

Introduction

Before we go on line, we want to help prepare you for what you will see and to define some of the terms we'll use often.

Windows

Windows form the basic screen structures in the program. There is one window for each menu option under “Start.” Each window has its own set of menu options. You can tell a window is still open if its icon appears at the bottom of your screen. To close a window push the  on the tool bar or select “Start” and “Exit.”



The three windows you will have access to are:

- ◆ **Manage Positions**, in which you will create position information;
 - ◆ **Administer Supervisor Request**, in which you will process awards; and
 - ◆ **Process Action Requests**, in which you will process all other actions and review or inquire records.
-

Menus

Menus provide the lists of processes and their associated panels. The menus pull down from the menu bar. The types of menus available vary from window to window. The “Start” menu is the exception. It is in every window and has the same options in every window.


Tool bar

The tool bar provides icon/shortcuts to frequently used programmatic functions, e.g., save, process, insert row, etc. The icon bar is the same in every window or panel.

Panels

Each menu option (process) within a window opens into a panel or group of panels. Panels are the screens on which you enter data into the database. They are comprised of fields that:

- ◆ have been filled in (populated) by data already present in the database;
- ◆ have valid values available for you to select from a pull down list; or
- ◆ have blanks for you to insert the appropriate information.

You move between panels by clicking on . You can tell which panel you are on by looking at the status bar at the bottom of the window.

You must complete all the required fields in a panel before it will allow you to save.

Modes

Modes are a system feature that sets the parameters for which records you can view or change. CHRIS allows you to enter/view actions in four modes:

| This Mode | Allows you to View | or Change | and Insert New Rows |
|--------------------|---|-------------------|---|
| Add | N/A | N/A | Inserts new row of data (record) to the database |
| Update/Display | Current rows Future rows | Future rows | Effective date greater than or equal to the current row |
| Update/Display All | History rows Current rows Future rows | Future rows | Effective date greater than or equal to the current row |
| Correction | History rows Current rows Future rows | All existing rows | Any effective date, without restriction |

We recommend you use update/display most of the time to protect historical data. We also caution you to use correction carefully, as it is possible to accidentally overwrite historical data in this mode.

Field

A field is the point of data entry on a panel. It is comprised of a label and an entry blank. The label references the column of the associated table. The blank is where you physically enter/modify data either by typing or selecting a valid value from a list.

Row

A row is a portion of the database in which you enter data to form a record. Each row has an effective date associated with it. It is possible to enter multiple rows in certain fields.

For example, under the field “Remark Code” you enter a separate row for each remark, i.e., one row for a K16, one row for a K20, etc. You can move between the various rows for that field by using a scroll bar.

3. Navigational Techniques and Tips

Techniques

The following are ways to help you get around CHRIS program as efficiently as possible. Frequently, there is more than one way to get to where you want to go.

Cursor


Simply **use the mouse** to move the cursor to wherever you want to enter data or **select an item and click**. This is not usually the fastest way to navigate, though sometimes it is the only option.



Tab/Shift+Tab

This is the best way to **move between fields on a panel**. To move forward use tab. To move backward use shift+tab. Note that options selected from valid value lists or pull down menus may not appear until you have tabbed to the next field. When you use tab to move between fields, the field is highlighted as you move into it, which allows you to type over existing data.

Save

Use the icon  to save after you have completed an action. If you try to save before the action is complete, you are likely to get an error message telling you that required fields are missing. You must go back and fill in the required fields before the system will allow you to save.

Enter

This key functions the same as the diskette icon to **save** entries. However, we recommend you use the diskette icon instead. You can also use enter to select highlighted options from pull down menus.



Cancel/Close

This icon  is used to:

1. Cancel out of an action part way through. None of the entries made on that action will be saved; or
2. Close a window once an action is saved.

Scroll Bar

Use the scroll bar to **move between rows of data** for any given field. This is the only way to move between rows.

| | |
|---|---|
| <i>Pull Down Arrows</i> | These appear at the right side of fields. Click on them once and they will reveal a list of valid values for that field. Use these whenever they are available rather than keying in the data. Frequently it is faster, and it avoids data entry mistakes. |
| <i>Ctrl +F4</i> | This keystroke combination calls up an alternative search box . It provides fields for you to enter known data that will narrow the options provided in a valid value box. For example, if you are trying to locate a record for an employee named Smith and the system has 50 Smiths in it, you can use the Ctrl +F4 and enter other data that will narrow the options so that you don't have to scroll through all 50 names. |
| <i>Next/Previous Panel in Group Icon</i> | Use  and  to move between panels associated with the particular process you selected off the menu. Use these rather than the single "next/previous panel icons," which will take you through all the panels for all the processes under the selected menu option. |
| <i>Window Icon/Button</i> | These appear at the bottom of your screen whenever you move to a new window without actually exiting. You can toggle between windows by clicking on the window icon. |
| <i>Tips</i> | The following are a few reminders to help you along the way. |
| <i>Close Window Icons</i> | Be sure to close your windows when you are finished with them. Otherwise, they clutter up your desktop and use up memory. |
| <i>Preserve Old Records</i> | Be sure you insert a new row whenever you enter a change. You do not want to literally change the data in the panels because you want to preserve the historical record. You want to insert a new row and enter the new information under the new effective date. It's the effective date that determines which record the system uses as the valid current data. |
| <i>Find a Valid Value</i> | If you are having trouble finding a valid value and the pull down list associated with a field is too long to read through, use Ctrl+F4. This will bring up a dialogue box that will help you identify and limit the number of options available. |
| <i>Tab Between Fields</i> | We can't say it enough times! This is the best way to get around a panel. |

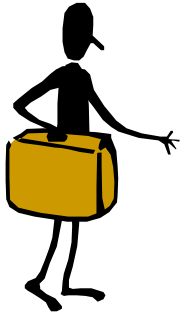
Avoid Typing

Whenever the option is available, use the pull down arrows or Ctrl +F4 and select valid values. This will frequently be quicker than typing and will prevent you from making data entry errors. **Do not assume PAY/PERS values are the same in CHRIS.**

4. Exploring the New World of CHRIS

Instructions

Use the worksheet provided by your instructor to explore the system on your own or in pairs. Use the space below to take any additional notes or questions you have.



5. Quick Quiz (Click on questions for answers!)

Instructions

Answer the questions below to help you evaluate your understanding of the material covered in this section. We will review the answers together. No one else will see your answers.

Questions

1. Match the items with their descriptions.

- | | |
|------------------------|--|
| 1. Relational database | a) the basic screen structure; each one has its own unique menu bar |
| 2. Window | b) the basic component of the database comprised of columns and rows |
| 3. Panel | c) a portion of the table into which new data is entered; also called a record |
| 4. Menu | d) a series of tables linked by key fields |
| 5. Table | e) a table column as displayed on a panel |
| 6. Field | f) screens on which the user enters data into the database |
| 7. Row | g) a list of process options |

2. “Effective date” refers to:

- a) the date an action goes into effect
- b) the date an action is processed
- c) the date a site goes live
- d) dinner and a movie

3. What are some of the advantages of having history, current, and future effective dates in the system?

4. Answer the questions below the following table:

| PAR No. | Name | Action | Effective Date |
|---------|-------------|--------------|----------------|
| 0003021 | Smith,Sam S | Hire | 04/30/95 |
| 0005923 | Smith,Sam S | Reassignment | 06/25/96 |
| 0023461 | Smith,Sam S | WGI | 07/03/97 |
| 0029483 | Smith,Sam S | Resignation | 09/15/97 |







Today is July 20, 1997

- a. Which rows are history? _____
- b. Which rows are current? _____
- c. Which rows are future? _____

5. Match the items on the screen to their descriptions:

- | | |
|-----------|-----------------|
| 1. _____ | a. status bar |
| 2. _____ | b. title bar |
| 3. _____ | c. menu bar |
| 4. _____ | d. tool bar |
| 5. _____ | e. scroll bar |
| 6. _____ | f. process |
| 7. _____ | g. panel |
| 8. _____ | h. mode |
| 9. _____ | i. radio button |
| 10. _____ | j. field |

6. Match the description to the icon bar item.

- | | |
|-----------------------------|--|
| a) Add _____ | 1.  |
| b) Save _____ | 2.  |
| c) Run _____ | 3.  |
| d) Cancel _____ | 4.  |
| e) Insert a row _____ | 5.  |
| f) View next panel in group | 6.  |

7. Which windows do you have access to in PeopleSoft 5.2?

- a. _____
- b. _____
- c. _____

8. Describe two tips you found particularly useful.

- a. _____
- b. _____

5. Quick Quiz

Instructions

Answer the questions below to help you evaluate your understanding of the material covered in this section. We will review the answers together. No one else will see your answers.

Questions

1. Match the items with their descriptions.

- | | |
|---------------------------------|--|
| 1. Relational database d | a) the basic screen structure; each one has its own unique menu bar |
| 2. Window a | b) the basic component of the database comprised of columns and rows |
| 3. Panel f | c) a portion of the table into which new data is entered; also called a record |
| 4. Menu g | d) a series of tables linked by key fields |
| 5. Table b | e) a table column as displayed on a panel |
| 6. Field e | f) screens on which the user enters data into the database |
| 7. Row c | g) a list of process options |

2. “Effective date” refers to: **a**

- a) the date an action goes into effect
- b) the date an action is processed
- c) the date a site goes live
- d) dinner and a movie

3. What are some of the advantages of having history, current, and future effective dates in the system?

- ability to do analysis
- ability to process proactively

4. Answer the questions below the following table:

| PAR No. | Name | Action | Effective Date |
|---------|-------------|--------------|----------------|
| 0003021 | Smith,Sam S | Hire | 04/30/95 |
| 0005923 | Smith,Sam S | Reassignment | 06/25/96 |
| 0023461 | Smith,Sam S | WGI | 07/03/97 |
| 0029483 | Smith,Sam S | Resignation | 09/15/97 |







Today is July 20, 1997

- a. Which rows are history? 1 and 2 _____
- b. Which rows are current? 3 _____
- c. Which rows are future? 4 _____

5. Match the items on the screen to their descriptions:

- | | |
|-------------|-----------------|
| 1. b _____ | a. status bar |
| 2. c _____ | b. title bar |
| 3. h _____ | c. menu bar |
| 4. e _____ | d. tool bar |
| 5. f _____ | e. scroll bar |
| 6. i _____ | f. process |
| 7. j _____ | g. panel |
| 8. a _____ | h. mode |
| 9. g _____ | i. radio button |
| 10. d _____ | j. field |

6. Match the description to the icon bar item.

- | | |
|-------------------------------|--|
| a) Add 4 _____ | 1.  |
| b) Save 1 _____ | 2.  |
| c) Run 5 _____ | 3.  |
| d) Cancel 6 _____ | 4.  |
| e) Insert a row 3 _____ | 5.  |
| f) View next panel in group 2 | 6.  |

7. Which windows do you have access to in PeopleSoft 5.2?

- a. Manage Positions _____
- b. Administer Supervisor Requests _____
- c. Process Action Requests _____

8. Describe two tips you found particularly useful.

- a. _____
- b. _____

Module 3: Processing Key Actions

Contents

1. CHRIS Processing Procedures
 2. Trial Run Exercise
 3. In-Basket Exercise
-

Objective

By the end of this module, you will be able to:

- ◆ Process six different key actions; and
 - ◆ Use the CHRIS Processing Procedures as a desktop resource.
-

1. CHRIS Processing Procedures

| | |
|---------------------------------|---|
| Description | <p>The CHRIS Processing Procedures are a desktop reference tool for walking end users step by step through a particular action. As part of the desktop reference tool, we have included:</p> <ul style="list-style-type: none">◆ Basic Operations and Functions◆ Step-by-Step Instructions for Processing Personnel Actions◆ Panel Shots◆ Additional Resources |
| Overview of Basic Steps | <p>Each procedure will walk you through four basic steps:</p> <ol style="list-style-type: none">1. Create/Modify Position Information2. Request Personnel Action (SF-52)3. Process Notification of Personnel Action (SF-50)4. Print a Coded SF-52 |
| Following the Procedures | <p>We've attempted to make the format for the procedures easy to follow. For additional information on some of the formatting conventions we've used, see page 8 of the CHRIS Processing Procedures. The procedures have been designed with plenty of space for notes, so write down tips for yourself or other users. You may wish to document any questions/issues that need to be raised with the CHRIS staff for resolution.</p> |
| There is no procedure! | <p>If you come across an action that you need to process and no procedure has yet been written try the following.</p> <ol style="list-style-type: none">1. Boldly go where no end user has gone before! Try to work your way through using the basic four steps as a guide. Be sure to document your work and share it with others when you are done.2. Call FETC or the end users group to see if anyone else has tried it. |

Help!

If you run into trouble entering an action, here are your options in the order you should try them.

1. Double check your work.

- ◆ Make sure you haven't mistyped information.
- ◆ Use the drop down arrows/Ctrl F4 and select options only off the valid value lists.

2. Cancel out of the action.

- ◆ If the system won't take your entry and will not let you proceed through the panels, your only option is to try again.
- ◆ Press cancel to clear out of the action (you will lose everything you have entered on this action).
- ◆ Follow the procedures exactly and write down every keystroke you make and every response you get.
- ◆ If you can't see where you've gone wrong, go to step 3.

3. Call your local power user or another end user or call another member of the user group.

- ◆ See if anyone else has had the same trouble and can provide a solution.
- ◆ Don't forget to access the on-line end user chat room. The CHRIS web site is at: <http://www.rfets.gov/chrishp.htm>.

4. Call the FETC CHRIS Room. 304-285-4729. Have your keystroke log and observations ready.

2. Trial Run Exercise

Purpose

To practice using the CHRIS Processing Procedures when entering a personnel action.

Instructions

1. Find a partner.
2. Your instructor will give you a sample SF-52. Find the appropriate procedure in the CHRIS Processing Procedures.
3. Decide how you and your partner will divide the task (We recommend one of you enter Steps 1 and 2, and one of you enter Steps 3 and 4. Whoever is not typing can either read the instructions to the typist or can observe and take down notes...or both.)
4. Log on to CHRIS using the training operator id and password provided by the instructor earlier.
5. Follow the procedures to complete the action.

3. In-Basket Exercise

Purpose

To provide opportunity for participants to practice entering/observing six key personnel actions.

Instructions

1. Your instructor will give you a file folder of Personnel Action Requests.
2. Use the CHRIS Processing Procedures to process as many of the Personnel Action Requests as you can.
3. Take turns processing actions. Do not do the same action as the person before you. When you are not actually entering an action, be sure to observe and assist the person doing the entering, so that you are exposed to all six actions.
4. You have until 4:15.

Module 4. Going Live!

Contents

1. Testing 1, 2, 3
 2. Showtime!
-

Objectives

By the end of this module, you will be able to:

- ◆ Process five live actions using the CHRIS Processing Procedures Guide and FETC subject matter experts as resources; and
 - ◆ Complete a keystroke log form.
-

Testing 1, 2, 3

Table Talk!

Your instructor will lead you in an activity to review what you covered yesterday. Have fun! Prizes will be awarded!

Tag Team Trials

Objective: To be the first team to successfully complete a documented personnel action without using the CHRIS Processing Procedures.

1. Find a partner.
 2. Select an action from the envelope provided by the instructor.
 3. On the instructor's mark, log on to the training database using the password provided.
 4. Complete the action and fill out the keystroke log *without* using the CHRIS Processing Procedures.
 5. The first team to complete the action and log within 40 minutes wins!
 6. Compare your log against the CHRIS Processing Procedures. Did you do everything you were supposed to?
-

Showtime!

Goal

For the next five hours you will be entering actual actions into your site's database. ***Your goal should be to process at least five different types of actions.***

Instructions

- ◆ Test out your operator id and password provided by the system administrator. Change your password to ensure its security.
 - ◆ Begin processing actions using the CHRIS manual to guide you.
 - ◆ Be sure to try a variety of actions. If you are sharing a computer, switch off after every action.
 - ◆ Your instructor will be happy to assist you if necessary.
-

Module 5: Next Steps

Contents

1. Back to the Future
 2. Final Check
 3. Evaluation
 4. Follow-up
-

Objectives

By the end of this module you will be able to:

- ◆ Identify concerns and suggestions for implementing CHRIS at your site;
 - ◆ Evaluate your confidence and skill level in processing personnel actions on CHRIS; and
 - ◆ Evaluate the training course and establish a follow-up evaluation time.
-

1. Back to the Future

The Challenge....

The trouble with training is that it can never *completely* prepare you for the conditions you are going to face back on the job. Before you head back. Let's take a few minutes to think about what challenges you will face in performing personnel actions in CHRIS and how you might overcome them.



Use the space below to take notes to help you remember what you want to do when you get back on the job.

1. Back to the Future

The Challenge....

The trouble with training is that it can never *completely* prepare you for the conditions you are going to face back on the job. Before you head back. Let's take a few minutes to think about what challenges you will face in performing personnel actions in CHRIS and how you might overcome them.



Use the space below to take notes to help you remember what you want to do when you get back on the job.

Brainstorm with participants about the issues they face: Some common ones might be:

Other work obligations pushing dual entry requirements to the back burner
hardware/software troubles

Some recommended solutions:

Use sample workflow templates as a starting point to determine how actions will be processed under dual entry system.

Practice. Process actions right away.

Stay in touch with other users. Join the user's group; share information.

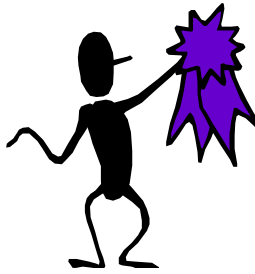
Revisit End User Roles

If possible arrange a conference call with other trained end users to introduce them to the new trained end users and to discuss how they used CHRIS on the job.

Recognize and record number of actions they processed.

2. Final Check

Instructions



Please answer the questions below without looking at any of your notes. Your instructor will collect your answers.

1. Circle all of the following that are reasons DOE has decided to develop a corporate human resource information system.
 - a) Most of DOE's current systems are not year 2000 compatible.
 - b) PeopleSoft was free to the government.
 - c) It is more cost effective to have a corporate system rather than maintain many separate systems
 - d) We wanted to be able to do better analysis of our human resources data and to do it more efficiently.
 - e) In developing a corporate system, we would have to address our HR business practices and streamline them.
 - f) We wanted one site to be able to enter and control all the HR data for DOE.
2. Which of the following are advantages of CHRIS over PAY/PERS? Circle all that apply.
 - a) CHRIS uses client/server technology, which is slower, but more accurate than PAY/PERS.
 - b) CHRIS uses a user-friendly windows environment.
 - c) Once you enter an action into CHRIS you can see the new record immediately. You don't have to wait for batch processing.
 - d) Once you enter a piece of information in CHRIS, it generally will automatically populate all the fields in any panel that requests that same information.
 - e) You cannot enter actions in CHRIS before they are effective, which prevents wrong information from being distributed through the system.

3. As a trained CHRIS end user you are responsible to: (Circle all that apply)
 - a) Share questions, solutions, concerns with other users across the DOE complex.
 - b) Develop a user's manual for your site.
 - c) Use CHRIS immediately.
 - d) Become a CHRIS subject matter expert and resource for your site.
 - e) Keep using PAY/PERS until payroll is outsourced.

4. List the three windows that are available to use as an HR personnel assistant.
 - a. _____
 - b. _____
 - c. _____

5. True/False. The best way to navigate through the fields on a panel is to click and point the cursor.
6. True/False. The only way to select the correct valid value to enter in a field is to use Ctrl + F4.
7. True/False. FETC-CHRIS team members are the only people who should "push" an action.
8. True/False. You can save by pressing enter or by clicking on the diskette icon.
9. Which of the following names and dates are correctly formatted for entry into CHRIS? Circle all that apply.
 - a) Chris Kringle Jr., P
 - b) Graham,Karan L
 - c) Clinton, William J.
 - d) 071997
 - e) 07/01/97

9. List the four basic steps for processing any action.
 - a. _____
 - b. _____
 - c. _____
 - d. _____
10. True/False. It is more common to “override” on a 50 than a 52?
11. True/False. The employee identification number is automatically assigned by the system?
12. True/False. The PD number exists in an electronic library on the system.
13. True/False. The position number is assigned automatically by the system.
14. True/False. Scroll bars are used to move between panels.
15. True/False. The system default for an effective date on a new action is the current day’s date.
16. True/False. It is generally better to print the SF-52 before you enter the information to process the 50.
17. True/False. You can tell which panel you are in by looking at the title bar.
18. True/False. Never try to process an action for which there is no guidance in the CHRIS Processing Procedures.
19. True/False. Using the drop down arrows or valid value lists helps prevent data entry errors.
20. Circle all the circumstances in which it is appropriate to insert a new row.
 - a. Before entering new personnel action information on an employee’s record
 - b. When adding a new position to the system
 - c. When changing the PAR status to 5

3. Evaluation Form

General Data

Please fill in the blanks below.

Today's date

Name of instructor 1

Name of instructor 2

Your job series

Instructions

Please complete this form by circling the choice that best reflects your reaction to the statement. The key for the scale is:

Strongly Agree = 5

Agree = 4

Unsure = 3

Disagree = 2

Strongly Disagree = 1

Statements/Responses

Instructor 1 was knowledgeable/well prepared.

5 4 3 2 1

Instructor 2 was knowledgeable/well prepared.

5 4 3 2 1

The course materials were helpful.

5 4 3 2 1

The course materials were well organized/clear.

5 4 3 2 1

The CHRIS Processing Procedures are user friendly.

5 4 3 2 1

I am confident I will be able to process personnel action requests on the job with the assistance of the CHRIS Processing Procedures.

5 4 3 2 1

The course length is appropriate.

5 4 3 2 1

The facilities and equipment supported the course needs.

5 4 3 2 1

I believe this course well prepared me to process personnel actions on CHRIS.

5 4 3 2 1

Freeform Feedback

Please use the space below to make any comments you have about the course. We particularly appreciate feedback on what you found most helpful and what issues/areas we should add or cover in more detail. Thank you for taking the time to complete this form.

Reminder

Don't forget to set a follow up date with the instructor.

4. Follow-up

Instructions

Use this form as a guide for the telephone follow-up interview two weeks after the course.

Participants may want to take notes on this form during the two weeks as a way of preparing for the interview.

Instructors will fill this form out and submit it to HR as part of the course record. It will be used to improve the quality of future training sessions.

General Information

Please fill in the blanks below.

Today's date

Date of training

Participant's site code

Participant's job series

Instructor's name

Questions/Responses

How well did the course prepare you for processing actions on the job?

- ◆ Very well
- ◆ Well
- ◆ OK
- ◆ Not very well
- ◆ Not at all

How frequently have you used CHRIS since the training?

- ◆ Every day
- ◆ Almost every day
- ◆ At least twice a week
- ◆ At least once a week
- ◆ Not at all

Approximately how many actions have you processed live on CHRIS since the training?

- ◆ 1 - 10
- ◆ 10 - 20
- ◆ 20 - 30
- ◆ 30 or more

How long does it take you on average to process an action?

- ◆ Less than 10 minutes
- ◆ 10 - 20 minutes
- ◆ 20 - 30 minutes
- ◆ More than 30 minutes

How much do you use the CHRIS Processing Procedures?

- ◆ Every time I use CHRIS
- ◆ Frequently
- ◆ Occasionally
- ◆ The first several times I process a type of action I haven't done before
- ◆ Not at all

Have you tried to perform any actions not covered in the CHRIS Processing Procedures? ☐ Yes ☐ No

If so: Which? _____

Did you document your keystrokes? ☐ Yes ☐ No

Did you share the information with other users? ☐ Yes ☐ No

How many times have you called FETC or a fellow end user for assistance?

- ◆ 1-3
- ◆ 3-5
- ◆ 5-10
- ◆ 10 or more

How would you rate your confidence level in using CHRIS?

- ◆ Very confident
- ◆ Confident
- ◆ Somewhat confident
- ◆ Not very confident

How would you rate your skill level in using CHRIS?

- ◆ Advanced
 - ◆ Competent
 - ◆ Familiar
 - ◆ Novice
-

Freeform Feedback

What were the top three things you did/learned during training that have been most useful to you on the job?

1. _____

2. _____

3. _____

What barriers do you face in processing actions on CHRIS?

After being back on the job for two weeks, what recommendations would you make regarding the training that we could implement to benefit future training participants?

Any other comments?



Thank you


We appreciate you taking the time to help us improve our training program.



CHRIS Exploration Worksheet (Click on questions for answers!)

1. Describe the icon that allows you to save.
2. What function does the traffic light icon serve?
3. Describe the icon that allows you to cancel an action.
4. Under which menu do you find “Manage Personnel Actions”?
5. What are the names of the other two windows available under “Manage Personnel Actions”?
6. Open Process Action Request window. Which menu(s) do you think you would actually use to process personnel actions?
7. Under “Process Action Requests—Use,” which process has the most panels associated with it?
8. How many panels are associated with job data?
9. Go to Process Action Request, Use, HR Requests, Action, Update/Display. When you try to access a record, what three types of information can you use to call up the person’s record.
10. Select “Hire—Action.” Press the “Enter” key. What happens?
11. What is the proposed effective date for the action on your screen?



12. Click . What happens?
13. Click  again. What happens?
14. Enter your name using the PeopleSoft format: Lastname-comma-no space-Firstname space Middleinitial-no punctuation
15. On which panel(s) can you enter information about the person's education?
16. On which panel(s) do you find information about within grade increases?
17. Press "Enter." What happens?
18. Click the diskette icon. What happens?
19. Identify at least two processes available under "Administer Supervisor Request" that are not available under the "Process Action Request" processes.
20. What three processes can supervisors take related to awards?
21. How many processes are available under the Use menu in "Manage Positions"?
22. How many panels are in the "Position Data" group?
23. Find the "Retirement" process. Select it then select Action, Update/Display.
24. Type Flan (or Beet) into the name blank in the dialog box. Press "Enter." What happens? Select the first name on the list by double clicking


25. Insert a row. What happens?
26. Click  until you get to the Forwarding Address panel. How can you tell you have arrived there?
27. Click on the pull down arrow in the country field. What happens?
28. Click on the country field again and press Ctrl + F4. What happens?
29. Type a capital E in the blank for Description. Press OK What happens? Select Ecuador.
30. Press the cancel icon. What happens? Press Exit under the start menu what happens?
31. Count the number of PeopleSoft icons appearing on your desktop. Close them all.



CHRIS Exploration Worksheet Key

- | | |
|---|--|
| 1. Describe the icon that allows you to save. | 1. diskette |
| 2. What function does the traffic light icon serve? | 2. run (will use this to generate an OF8) |
| 3. Describe the icon that allows you to cancel an action. | 3. X Remind them that this does not save actions. Use when you want to escape/cancel |
| 4. Under which menu do you find "Manage Personnel Actions"? | 4. Start |
| 5. What are the names of the other two windows available under "Manage Personnel Actions"? | 5. Administer Supervisor Requests and Process Action Requests |
| 6. Open Process Action Request window. Which menu(s) do you think you would actually use to process personnel actions? | 6. Use and Process |
| 7. Under "Process Action Requests—Use," which process has the most panels associated with it? | 7. Applicant Hire |
| 8. How many panels are associated with job data? | 8. 4 |
| 9. Go to Process Action Request, Use, HR Requests, Action, Update/Display. When you try to access a record, what three types of information can you use to call up the person's record. | 9. SSN, EmplId, Name |
| 10. Select "Hire—Action." Press the "Enter" key. What happens? | 10. Brings up panel, automatically assigns EmplId |
| 11. What is the proposed effective date for the action on your screen? | 11. Today's date |

- | | |
|--|--|
| 12. Click  . What happens? | 12. Moves to next panel—remind them to use this vs. single panel arrow icon. |
| 13. Click  again. What happens? | 13. Highlights required field in red |
| 14. Enter your name using the PeopleSoft format: Lastname-comma-no space-Firstname space Middleinitial-no punctuation | 14. |
| 15. On which panel(s) can you enter information about the person's education? | 15. Personal Data 2, Education |
| 16. On which panel(s) do you find information about within grade increases? | 16. Job Data 4, Employment Data 2 |
| 17. Press "Enter." What happens? | 17. Tries to save. Highlights missing required fields. Remind them not to press enter until the are completely finished with a panel group. Better yet, use tab to get around the panels and the diskette icon to save.. |
| 18. Click the diskette icon. What happens? | 18. Same as above |
| 19. Identify at least two processes available under "Administer Supervisor Request" that are not available under the "Process Action Request" processes. | 19. See list. Emphasize that we will only use this window for awards. |
| 20. What three processes can supervisors take related to awards? | 20. Initiate, authorize, approve |
| 21. How many processes are available under the Use menu in "Manage Positions"? | 21. 2 Will only use Position Data, however. |
| 22. How many panels are in the "Position Data" group? | 22. 6 |
| 23. Find the "Retirement" process. Select it then select Action, Update/Display. | 23. Administer Supervisor Requests—Use |

- | | |
|---|---|
| 24. Type Flan (or Beet) into the name blank in the dialog box. Press "Enter." What happens? Select the first name on the list by double clicking | 24. A valid value box with a list of employees' names beginning with Flan or Beet appears |
| 25. Insert a row. What happens? | 25. New record is inserted, with today's effective date. |
| 26. Click  until you get to the Forwarding Address panel. How can you tell you have arrived there? | 26. See name in status bar at bottom of screen. |
| 27. Click on the pull down arrow in the country field. What happens? | 27. A valid value box appears. |
| 28. Click on the country field again and press Ctrl + F4. What happens? | 28. A dialog box appears to help you conduct an alternative search. (narrows search lists) |
| 29. Type a capital E in the blank for Description. Press OK What happens? Select Ecuador. | 29. A valid value box appears listing all countries beginning with E. (Explain that this should work in all searches but doesn't due to a bug.) |
| 30. Press the cancel icon. What happens? Press Exit under the start menu what happens? | 30. Closes without saving; returns to desktop. |
| 31. Count the number of PeopleSoft icons appearing on your desktop. Close them all. | 31. Warning. These eat up a lot of memory. In Windows 95 they appear as bars at the bottom of the screen. Toggle between them to conserve memory. |